

The development, validation, and effect of Patients' own Surgical Safety Checklist: A tool to empower and involve patients in safety

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- WHO's global patient safety action plan 2021-2030
- Patient user involvement- Statutory right in Norway³
- WHO's surgical safety checklists has shown to reduce complications and mortality^{1,2}
- Checklists for patients indicates reduction in hospitalisation time and complications⁴

- 1) Haynes AB, et al. A Surgical Safety Checklist to Reduce Morbidity and Mortality in a Global Population. *N Engl J Med*2009;360(5):491-99. doi: 10.1056/NEJMs0810119
- 2) Haynes AB, et al. Mortality Trends After a Voluntary Checklist-based Surgical Safety Collaborative. *Annals of Surgery*2017; Publish Ahead of Print doi: 10.1097/sla.00000000000022498.
Haugen AS, et al. Effect of the World Health Organization Checklist on Patient Outcomes: A Stepped Wedge Cluster Randomized Controlled Trial. *Annals of Surgery*2015;261(5):821-28. doi: 10.1097/sla.0000000000000716t
- 3) Norwegian patients and user right law
- 4) Hardiman KM, et al. Patient autonomy-centered self-care checklist reduces hospital readmissions after ileostomy creation. *Surgery*2016;160(5):1302-08. doi: <https://doi.org/10.1016/j.surg.2016.05.007>



Patient's surgical safety checklist

- Patient's surgical Safety Checklist - PASC
- PASC- developed and validated in Norwegian Hospitals ^{1,2}

Aim: Empower patient involvement in own safety to prevent patient harm through the surgical pathway



- 1) Harris K, et al. Patients' and healthcare workers' recommendations for a surgical patient safety checklist –a qualitative study. BMC Health Services Research 2020;20(1):43. doi: 10.1186/s12913-020-4888-1
- 2) Harris K, et al. Development and validation of patients' surgical safety checklist. BMC Health Serv Res 22, 259 (2022). <https://doi.org/10.1186/s12913-022-07470-z>

PASC Development and Validation

- Patient surgical risk areas were identified:
 - Focus group interviews
- Consensus process on checklist content:
 - Healthcare professionals
 - Patient representatives
- PASC was validated and tested:
 - 215 surgical patients



Pre-operative PASC

- Medication safety
- Optimising own health
- Patient preparations
- Clarifying information
- Use of safe surgery checklist

Your checklist before surgery
To prevent complications that can occur throughout your surgery Use your checklist to cross off the relevant response to EVERY question
Write down any non-urgent questions you may have and bring them with you to the hospital so you can ask a healthcare worker
If you require any clarification, or if any issues arise while you are using the checklist, contact (ward name) on this telephone number: _____
Important issues you should consider before your surgery
1. Are you using any medications? <input type="checkbox"/> No, go to question 4 <input type="checkbox"/> Yes, memorise the name of your medication, what they are for, how they look and the time you take them
2. Are you using blood-thinning medications? <input type="checkbox"/> Yes. Have you been informed of when, or if you should stop them before your surgery? If not, contact the ward 2 weeks before your surgery to clarify <input type="checkbox"/> No
3. Do you have a medication list with the latest changes? <input type="checkbox"/> Yes. Remember to bring it to the hospital <input type="checkbox"/> No. Contact your general practitioner and ask for a updated medication list
4. Do you have diabetes, high blood pressure, cardio-vascular, non-healing wounds or receiving treatment for other chronic conditions? <input type="checkbox"/> No <input type="checkbox"/> Yes, if you have not been for a control the last 12 months contact your general practitioner
5. Have you received dental treatment, medical treatment, or been hospitalised, or worked in hospitals overseas the last 12 months? <input type="checkbox"/> No <input type="checkbox"/> Yes, contact your general practitioner and take bacterial tests before hospitalisation and call number provided and inform the hospital ward
6. Have you been informed that stopping smoking, alcohol and substance abuse as early as possible before surgery can reduce chances of complications? <input type="checkbox"/> Yes <input type="checkbox"/> No, contact your general practitioner for Information <input type="checkbox"/> Not relevant
7. Have you been informed that physical activity and a healthy diet before surgery can reduce chances for complications? <input type="checkbox"/> Yes <input type="checkbox"/> No, contact your general practitioner for information (clarify activity level)

Post-operative PASC

- Complications
- Activity and restrictions
- Medication safety
- Pain relief
- Further plans and follow-ups

Your checklist before hospital discharge
What you need to know before your discharge: Read the questions below before you talk to the doctor and nurse who is discharging you. Ask for missing information or written information if needed. This can prevent complications for you.
Use your checklist to cross off the relevant response to EVERY question
Information about complications 28. Have you been informed about possible complications? <input type="checkbox"/> Yes <input type="checkbox"/> No. Ask for information from your doctor or nurse
29. Have you been informed about what you should do if you experience complications or in an emergency? <input type="checkbox"/> Yes <input type="checkbox"/> No. Ask for information from your doctor or nurse
Information about activity and restrictions 30. Have you been informed about when you can drive after surgery? <input type="checkbox"/> Yes <input type="checkbox"/> No. Clarify with your doctor or nurse
31. Have you been informed about the importance of being physical active and when you can begin to exercise? <input type="checkbox"/> Yes <input type="checkbox"/> No. Clarify with your doctor or nurse
32. Have you been informed about activity restrictions? <input type="checkbox"/> Yes <input type="checkbox"/> No. Clarify with your doctor or nurse
33. Have you been informed about when you can shower again? <input type="checkbox"/> Yes <input type="checkbox"/> No. Clarify with your doctor or nurse
34. Have you been informed if you need to take any special considerations after your surgery? <input type="checkbox"/> Yes <input type="checkbox"/> No. Clarify with your doctor or nurse
Information about medication safety 35. Are you starting on any new medications? <input type="checkbox"/> No. go to question 39 <input type="checkbox"/> Yes. Use the checklist items under and ask your doctor to go through them with you
36. Have you been informed about possible side effects of your new medications? <input type="checkbox"/> Yes <input type="checkbox"/> No, clarify with your doctor or nurse
37. Have you been informed about whom to contact if you are experiencing side effects? <input type="checkbox"/> Yes <input type="checkbox"/> No. Clarify with your doctor or nurse

Patient's Safety Checklist (PASC) in Surgery, a Stepped Wedge Cluster RCT - Effects on Patient and Implementation Outcomes”

Work package 1: Effects of PASC implementation in surgical patients

Work package 2: Malnutrition

Work package 3: Implementation of PASC

Work package 1 -3: Health economics

PhD project: Health literacy

Design: Stepped wedged cluster randomised controlled trial

Surgical wards:

Orthopaedic

ENT/MaxilloFacial

Cardiac

Neuro

Brest and endocrine

Gastro

General surgery

1																
2																
3																
4																
5																
6																
7																

May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug

Start control steps: Nov 2021

Start intervention steps: May 2022

2023

End intervention: February 2024

Patient's experiences with using PASC

- Most patients found PASC to be useful
- PASC systemised information and prepared them for the surgical pathway
- Most patients said that PASC made them reflect and ask for clarifications or missing information
- Some had taken measures to contact their dentist or GP to optimise their own health
- Others had learned the names of their medications (taken pictures)

- A few stated that they did not find PASC useful, but when asked if they would use it again, they said yes.
- Most patients emphasised that healthcare professionals needed to be more involved in using the checklist

*“The checklist allowed me to go back and look at the information, instead of getting the information orally which you easily forget” **Breast and endocrine patient***

*“It gives you a sense of safety in relation to your surgery, it’s not something you do every day” **ENT patient***

*“The checklist increased my reflections to the highest degree “ **Cardiac surgery patient***

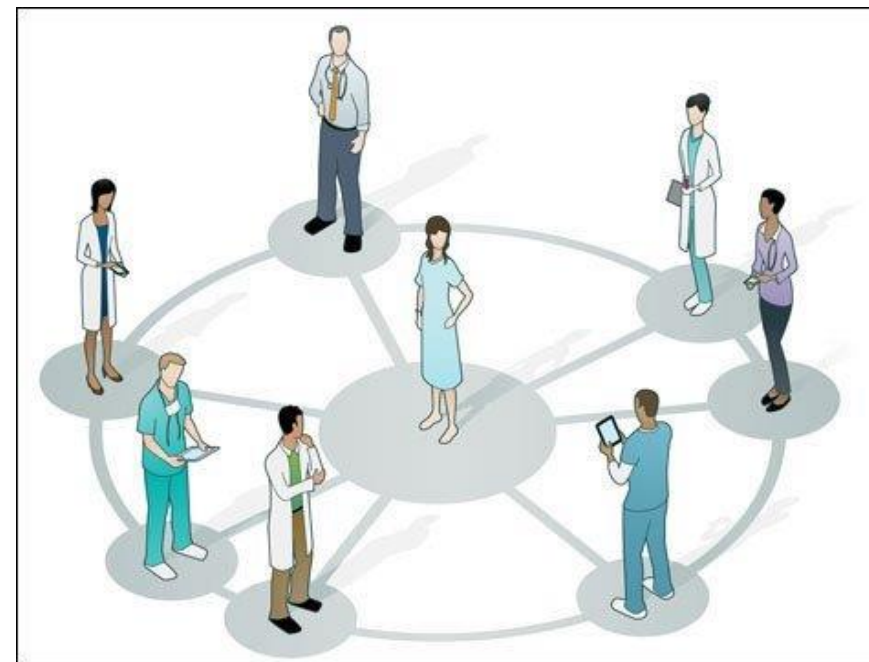


Illustration from: International Alliance of patients' organization Patient-Centred Healthcare Indicators Review. October 2012, <https://iapo.org.uk/sites/default/files/files/IAPO%20Patient-Centred%20Healthcare%20Indicators%20Review.pdf>

PASC-Research Group



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